Quick Reference Guide for PHA Users Version 1 Release 3.0 Resident Satisfaction Assessment Subsystem (RASS)

U.S. Department of Housing and Urban Development Real Estate Assessment Center (REAC)

November 17, 1999

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November 17, 1999 ii

Chapter 1: Introduction

The Real Estate Assessment Center (REAC) is a U.S. Department of Housing and Urban Development (HUD) national management center created to centralize and standardize the way HUD monitors and evaluates the physical condition and financial assessment of HUD properties. HUD properties include over 3,000 Public Housing Agencies (PHA) and over 30,000 Federal Housing Administration (FHA) multifamily insured, direct loan, HUD-held, and Section 8 project-based subsidized properties.

REAC developed the Resident Satisfaction Assessment Subsystem (RASS) to monitor the condition of HUD projects based on the Resident Service and Satisfaction Survey.

Objectives

The purpose of RASS is to measure the level of resident satisfaction with living conditions at PHA developments to provide safe and decent housing for residents. RASS will also provide REAC with a complete database to measure resident satisfaction.

RASS allows PHAs to verify their unit address information so HUD can mail the service and satisfaction survey to residents. RASS lists all address information currently available in HUD databases. PHAs are responsible for verifying current information, adding missing information (such as unit numbers or separate mailing addresses), and deleting or editing incorrect information. PHAs are also responsible for identifying what languages, other than English, are spoken by at least 20 percent of their residents that could not otherwise complete the survey in English. PHAs use the implementation plan to inform residents about the survey, sampling, and PHA reporting. Users can also download promotional media and record the dates promotional activities were implemented.

The enhanced features of RASS 3.0 allow Users to submit data for multiple PHAs, if necessary. After REAC scores the PHA on the Resident Service and Satisfaction Survey participation, the follow-up plan becomes available to PHA Users. The follow-up plan provides recommendations and guidance for creating an action plan.

RASS is used by PHA personnel responsible for verifying resident unit addresses and implementing the action plans at their PHA, and by REAC personnel responsible for assessing and monitoring resident satisfaction. All other HUD users have read-only privileges.

RASS is a Web-based system accessible via the Internet. It is a secure system available only to authorized users. Authorized users include those that have been issued user IDs for the system (e.g., PHA user) as well as all HUD users. Potential users can register on line for a user ID. Users are authorized when they receive their user IDs.

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Chapter 2: Getting Started

Software and Hardware Requirements

Using RASS requires computer resources and an Internet browser. The optimum software and hardware resources are recommended for efficiency, although users can operate with the minimum required resources.

Optimum Hardware Resources

Processor: Pentium 100

RAM: 16 MB Modem: 28.8 kb Video card: 256k

Download file size: 5.8 MB Installed file size: 10 MB

Optimum Software Resources

Windows 95

Netscape* 4.5 or HTML-compliant browser application

NOTE: Users can download Netscape* 4.5 or higher (32-bit) from the Internet. The

procedures to download Netscape* can be found at

http://home.netscape.com/download.

Minimum Hardware Resources

Processor: 486 RAM: 8 MB Modem: 14.4 kb Video card: 256k

Download file size: 5.5 MB Installed file size: 10 MB

Minimum Software Resources

Windows 3.1

Netscape* 3.5 or HTML-compliant browser application

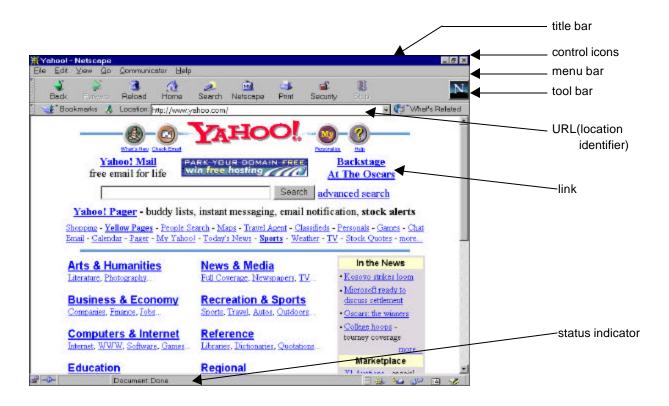
^{*}Copyright© Netscape Communications Corporation. All rights reserved. Protected by the copyright laws of the United States and international treaties.

Internet Basics

The Internet is a worldwide system of computer networks facilitating access to information and people. Using the Internet to access and use RASS requires a direct Internet connection and a computer with a high-speed modem and Netscape 3.5 or an HTML-compliant browser application. A browser allows access to web pages on the World Wide Web (WWW or the Web). The Web is a universally-accepted standard for sharing information in the Internet. The Web consists of information organized into pages stored in computers physically located throughout the world.

Web Page

The web page is a document or application with a unique address on the Web, including links to other pages. The **Yahoo!*** main page is shown below as an example.



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Title Bar

The title bar at the top of the page displays the title of the document or application of the Web page that is active or currently displayed. When more than one window is open, the title bar of the active window is bold; the other open title bars appear faded.

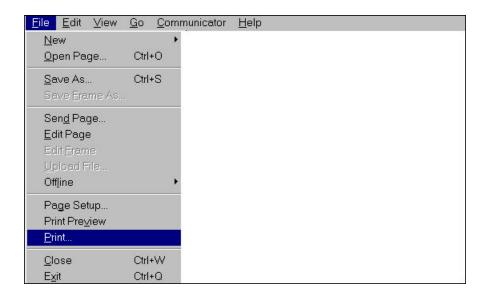
Control Icons

In the right corner of the title bar, there are three control icons. With a mouse click, the Minimize icon reduces or minimizes the window to the bottom of the page. To enlarge the window back to full size, click on the appropriately titled box at the bottom of the page. The Minimize/Maximize icon reduces the window to a smaller size, allowing the user to view other open windows or the desktop. To enlarge the window back to full size, click on again.

The last control icon is the Close icon. Clicking on this control icon closes the browser application (and the document or application open within the browser) and returns the user to the desktop.

Menu Bar

The menu bar provides drop-down menus for browser functions. By placing the cursor over a menu item and clicking on it with a left mouse button, the drop-down menu appears. Highlight the appropriate menu function with the cursor to make a selection.



Available menu functions are text items in bold. Menu functions that are not available appear faded and cannot be activated.

Tool Bar

The tool bar consists of buttons representing browser functions.



Available functions are buttons with bold text and graphics. A tool bar button appears faded if the function is not available.

Location Identifier

The unique location of the Web document or application is called the Uniform Resource Locator (URL). The URL is used to find a particular Web page among all the computers on the Internet. Enter the desired URL in the *Location* field and press the Enter key.

NOTE: The field is labeled "Location" for an Internet site. It is labeled "Netsite" for an intranet (internal/within the organization) site.

Status

The Netscape browser indicates the status of the action being performed. If the browser is performing an action (for example, searching a database for information): the Netscape logo

to the right of the URL address appears to have comets flying across it, the Stop sign on the tool bar is bold and red, and the status indicator line at the bottom of the page (next to the lock) describes the status (for example, "Connect . . . Waiting for reply"). Upon completion of the action, the logo returns to its static state, the Stop tool appears faded, and the status indicator line reads "Document: Done."

NOTE: The lock indicates whether the Web page is secure or not. Some Web pages can be secured or blocked from other Internet users if the page contains sensitive information, such as financial or housing information. If the lock is closed, the page is secure. If the lock is open, it is not a secure Web page.

Links

A link provides a method to move quickly from the current page to another Web page. Links are typically underlined, although they do not have to be. Click on a particular link, and it moves the user to that particular page. Once the link is accessed, it typically changes color to indicate the user has already accessed it once before.

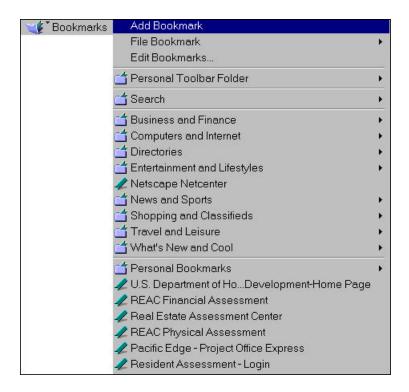
Bookmarks

The Bookmarks function is a browser tool that provides the user with quick access to a Web page. Once a Web page's title and location is marked as a bookmark in the browser, the user does not have to remember and type in the URL or go through a series of links to access that page.



To bookmark the currently displayed Web page, click on Bookmarks to the left of the *Location* field for the drop-down options. Click on the Add Bookmark option to mark the page. The Web page location is added.

NOTE: The browser in this example is Netscape. Display may vary according to the browser.



All bookmark(s) appear in list form under the Bookmarks option. Clicking on a bookmark in that list takes the user directly to that page.

REAC Customer Service Center Information

Users can contact the REAC Customer Service Center with any questions or problems. The REAC Customer Service Center can be contacted by sending an email message through the link on the RASS website. Please try to be as detailed as possible (e.g., identify screen, error, and action attempted). You can also contact the REAC Customer Service Center by telephone Monday through Friday 8 a.m. to 8 p.m., Eastern Time.

REAC Customer Service Center email link at the bottom of the RASS page

www.hud.gov/reac/rearessur.html

REAC Customer Service Center toll-free phone number

1-888-245-4860

This page is intentionally left blank.

Chapter 3: Registering for a System ID

Because the Resident Assessment Subsystem (RASS) is a secure, Web-based system that contains sensitive financial and housing information, security registration for a system ID is required. An Internet user can access RASS only after registering, being assigned system rights, and receiving a system ID.

Further restrictions apply regarding system access for PHAs. A user must be assigned to a PHA before the system will allow data entry and submission.

There are two types of Internet RASS users: Coordinators and Users. The Coordinator serves as the PHA's representative to perform system administration functions, such as controlling system access. The User submits data via RASS.

The Coordinator controls which Users have access to prepare, review, or submit data on behalf of the PHA. A Coordinator is also responsible for forwarding all information to the PHA that is received electronically from HUD.

A User also registers to do business on behalf of the PHA. The User, however, cannot control access to the system or assign rights. A User depends on the Coordinator for the necessary access to prepare, review, or submit data.

NOTE: In this guide, the term "user" is a generic term for individuals following the instructions for using RASS.

Coordinator and User Registration

All Coordinators and Users must submit a completed registration application to REAC to obtain a system ID for Internet access to RASS. Required registration information includes name and social security number, the PHA's name and PHA code, email address, desired password, and mother's maiden name. The registration form is available online from the RASS Web page.

Coordinator

Each PHA must designate a Coordinator, typically an employee, to act as their representative in providing RASS access to system Users. The Coordinator is then responsible for retrieving a User's system ID, establishing the User's role in the system, and assigning the User to the PHA for submission purposes.

NOTE: There can be no more than two Coordinators per PHA. It is recommended that each PHA designate two Coordinators to ensure backup for system administration needs.

A Coordinator can also serve as a User for the PHA. Therefore, if an individual will represent the PHA in system control (Coordinator) and will also submit data (User), the individual should register as a Coordinator.

User

A RASS User can be an employee of the PHA or a third party, such as a management agent, authorized by the PHA to submit data for the PHA.

Unlike a Coordinator, registered Users cannot control system access or User maintenance functions. The User is dependent on the Coordinator for system access as well as updating User information (e.g., email address).

REAC Resident Satisfaction Assessment Web Page

To register for a system ID and access RASS, Coordinators and Users must go the **REAC Resident Satisfaction Assessment** Web page. In addition to RASS links, this page presents information about the latest online documentation for using RASS, links to other HUDweb pages, and other pertinent information. The *What's New* section of the page provides important announcements and information updates. The **Resident Satisfaction Assessment Subsystem (RASS) box** contains links to apply for a system ID, to log in to RASS, this Quick Reference Guide, and information about security of personal data. The **Visit the REAC Product Pages** box contains links to other related pages.

NOTE: The contents of this page is updated and changed on a regular basis.



REAC Resident Satisfaction Assessment

What's New

For PHAs with FYEs of September 30, 1999:

The deadline for verification of unit addresses needed to conduct the Resident Assessment Survey in PHA's having a Fiscal Year End (FYE) of September 30, 1999 has been extended to June 4, 1999

For PHAs with FYEs of December 31, 1999:

- Training session for PHA staff via satellite broadcast June 17, 1999, 2-4 p.m. EST
- Registration for space to view satellite broadcast session

PHAs having other fiscal year cycles can apply now for their User ID and Password but should <u>not</u> begin unit address verification until notified. PHAs with FYEs of December 31 can start on or about July 2,

Instructions for submitting unit addresses:

- You must have a RASS User ID and Password to access the system and submit addresses. If you need a RASS User ID and Password, click on "Apply for User ID and Password". Allow two weeks to receive vour Password via the U.S.Mail.
- If you already have a RASS User ID and Password, click on "Log in to RASS" to begin
- verifying and/or submitting addresses.

 For help, click on "Quick Reference Guide"

PHA Resident Survey Pilot Test Results

Read the text of the Public Housing Assessment

- Subpart E, Resident Service and Satisfaction
- Read more about the Resident Service and Satisfaction Survey

The survey is available in both English and Spanish.

- English Version
- Spanish Version

Para ver la Encuesta de Servicio y Satisfacción del Residente en español <u>oprima aqui</u>

Frequently Asked Questions

- Questions Frequently Asked by PHA Staff
- Questions Frequently Asked by PHA Residents

Multifamily Tenant Survey

REAC is currently developing a survey instrument and process for measuring tenant satisfaction with housing conditions in FHA. s multifamily projects Aggregate results of the survey will be used as a management tool by HUD, project owners and their agents. During REAC, s survey development process, modifications to the existing Public Housing Resident Service and Satisfaction Survey will be made based on input from multifamily tenant groups, industry representatives, and a thorough legislative analysis. Then, a pilot survey will be conducted in a representative sample of multifamily projects before taking the process nationwide

"Assessments Today for Better Housing Tomorrow"

Resident Satisfaction Assessment Subsystem

- Apply for User ID and Password
- Log in to RASS
- Quick Reference Guide
- Information about Security of Personal **Data**

Visit the REAC Product Pages

- Financial
- Assessment Physical Inspection
- Single Family
- Appraisals
- PHAS Advisory Scores

Return to REAC Home Page

The Resident Satisfaction Assessment Subsystem (RASS) box provides two essential links for RASS Users and Coordinators. The <u>Apply for User ID and Password</u> link provides access to the **Coordinator and User Registration** page, where Users and Coordinators must apply for their system ID to access RASS. The <u>Log In to RASS</u> link provides access to HUD's **Secure Systems** page, which contains links to systems as well as system administration functions.

NOTE: The <u>Log In to RASS</u> link is only functional for registered Users and Coordinators with authorized system IDs.

To register for a system ID:

1. From your desktop, double-click on the Internet browser (e.g., Netscape*). The Internet main page displays. The Yahoo! main page is shown here as an example.



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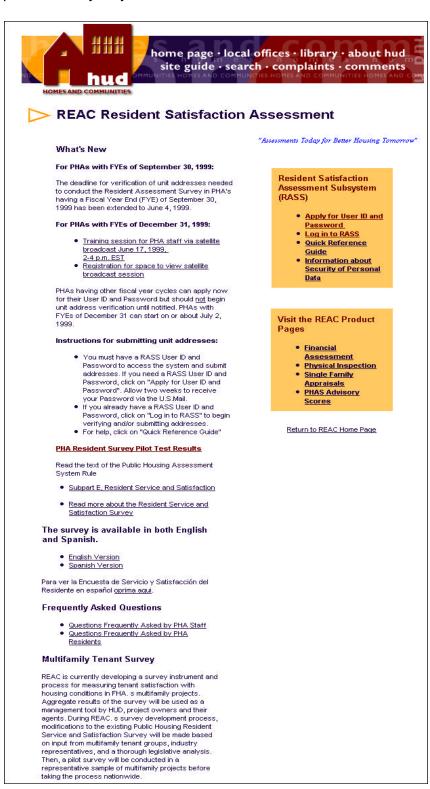
2. Place the cursor in the *Location* field under the toolbar.



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3. Enter the following URL address: www.hud.gov/reac/rearessur.html in the Location field. The REAC Resident Satisfaction Assessment home page displays. Use the scroll bar to view the entire page.

NOTE: The contents of this page is changed and updated on a regular basis, therefore, its appearance may vary as well.



- 4. On the REAC Resident Satisfaction
 Assessment home page, scroll down to the
 Resident Satisfaction Assessment Subsystem
 (RASS) box.
- 5. Click on the Apply for User ID and Password link to apply for a system ID from HUD. The **PHA User Registration** page displays.

Resident Satisfaction Assessment Subsystem (RASS)

- Apply for User ID and Password
- Log in to RASS
- Quick Reference
 Guide
 (Updated 9/10/99)
- Information about Security of Personal Data

| PHA User Registration |
|--|
| To apply for a User ID, fill out the form below, and click Send Application when you are through. Upon verification of the information below, an ID will be assigned and mailed to the Executive Director of your Housing Authority. The password will not disclosed, so make sure you remember it!!! |
| kud remember. Forming! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law purifies penalties for exceeding authorised access, alteration, damage or destruction of information residing on Federal Computers. |
| Application Type: Coordinator C User C |
| First Name: |
| Middle Initial: |
| Last Name: |
| Social Security Number: |
| Provide the Number of the Public Housing Authority you represent Organization Name: Organization ID: rovide your e-mail address. |
| Include your e-mail user name, the @ sign and [servicename.com/edu/org/neb/etc.]. For example: jsmith@aol.com, johndoe@adv.org, hfdb\$4a@prodigy.com. |
| E-mail Address: |
| hoose a Password. |
| You will enter your password each time you use this service. Your password should be 6 characters in length and should be comprised of letters and numbers (for example, brad83). Do not use punctuation or special characters. Important: Your password will be recorded EXACTLY as you type it, so make a note if you enter in upper and lower case. |
| Password: |
| Re-enter Password for Verification: |
| other's Maiden Name. |
| + Please provide this information for future verification when processing password reset requests. |
| Mother's Maiden Name: |
| Send Application Clear Fields |

6. Registration requires users to provide their full names and complete the entire application form. Use the Tab key on the keyboard to move to the next field.

| Ī r | |
|-------------------------|--|
| FIELD NAME | EXPLANATION |
| Application Type | Click on either the Coordinator or User radio button. |
| First Name | Tab and enter your first name. |
| Middle Initial | Tab and enter your middle initial. Do not type a period after the initial. |
| Last Name | Tab and enter your last name. |
| Social Security | Enter your social security number. Enter the first three digits, tab, enter the |
| Number | next two digits, and tab to enter the last four digits. |
| Organization | Tab and enter the name of the PHA. |
| Name | |
| Organization ID | Tab and enter the PHA code designated by HUD. |
| Email Address | Tab and enter the user's email address. Because this is a Web-based system, the complete email address must be entered for communication purposes. If the email address is incorrect, REAC cannot contact the applicant. |
| Password | Tab and enter a password of six characters. For Internet access to RASS, the password must be typed exactly as entered on this registration application. The password is case-sensitive. Tab once and re-enter the password to confirm it. |
| Mother's Maiden Name | Tab and enter the user's mother's maiden name. This field must be completed for verification purposes. |

7. Check to ensure the information in each field is correct. To correct a single entry, double-click in the field and enter the correct information. To clear all the fields, click on the button and re-enter all the information.

8. Click on the Send Application button to send the application to REAC. If the application is entered correctly and completely, a confirmation page displays.

Comments or Questions < REAC CSC(@hud.gov>

PHA Coordinator Registration PHA COORDINATOR REGISTRATION CONFIRMATION: First Name. JOHN. Middle Initial: Last Name **SMITH** Social Security Number: 123-45-4444 Organization Name: COLUMBUS METRO HA Organization ID: OHOOL E-mail Address: jsmith@pha.gov Mothers Maiden Name: **JONES** You are registering as a PHA Participant Coordinator for the PHA COLUMBUS METROPOLITAN HOUSING AUTHORITY - OH001. Please confirm the following address for COLUMBUS METROPOLITAN HOUSING AUTHORITY: 960 EAST FIFTH AVE. **COLUMBUS OH 43201** Your requested Coordinator ID or activation code number will be mailed to the above address associated with the property owner, PHA or other HUD program participant you seek to represent as a coordinator. You will need to obtain your ID/code number from the program participant's CEO or Executive Director at this address. If you do not recognize this as a current, complete or correct address associated with the HUD program participant you seek to represent, please cancel this application and have the program participant contact the appropriate HUD field office representative to obtain a clarification or correction of the address. If you do not know the HUD field office contact for this program participant, communicate your address concern to the REAC Customer Service Center, via the below e-mail click box at REAC_CSC. Please provide your name and daytime phone number. Confirm / Submit Cancel Application

NOTE: If the application is missing any information, a message displays identifying the missing information. Click on the button to return to the application form page. Correct or complete the missing information and send the application.

9. Review all the information for accuracy, especially the application type, PHA, and mailing address.

NOTE: The mailing address appears only for Coordinators (not Users). Do not proceed with the application if this mailing address is inaccurate or you will not receive your system ID.

10. If the information is accurate, click on the Confirm/Submit button to submit the application to HUD. A message displays acknowledging acceptance of the registration application for further processing. If the information is not accurate, click the Gancel Application button to cancel.

PHA Coordinator Registration



Message: STANDARD USER REGISTRATION ACCEPTED FOR FURTHER PROCESSING

First Name: **JOHN** Middle Initial: T Last Name: SMITH Social Security Number: 123-45-4444

Organization Name: COLUMBUS METRO HA

Organization ID: OH001

E-mail Address: jsmith@pha.gov

Mothers Maiden Name: JONES



Comments or Questions < REAC CSC@hud.gov>

After Registration

Coordinator and User registration applications are processed nightly. The PHA information is verified and a system ID is generated.

For Coordinators, HUD sends the PHA Executive Director a letter, confirming the applicant as the PHA's Coordinator and providing the Coordinator's system ID. The PHA Executive Director should receive the letter from HUD within 2 weeks. A Coordinator is authorized when they receive their system ID from the PHA Executive Director.

For Users, the User must notify the Coordinator that they have registered for a system ID. Within 24 hours, the Coordinator can retrieve the User's ID from the system and assign necessary role(s) and PHA(s) to the User. A User can enter RASS after they receive their system ID from the Coordinator.

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Chapter 4: Accessing RASS

To access RASS, a user must log in with their system ID. The letters in the system ID must be entered as capital letters. The password must be entered exactly as the user requested it on the registration application. For example, a password entered in lowercase letters on the registration must always be entered in lowercase letters to successfully log in to RASS.

Authorized users log in to RASS from the RASS home page. Users can bookmark the **REAC Resident Satisfaction Assessment** home page for quick access. However, because RASS is a secure system, the system ID and password must be entered each time the system is entered.

To log in to RASS:

1. From your desktop, double-click on your Internet browser (e.g., Netscape*). The initial page displays. The **Yahoo!**⁺ main page is shown as an example.



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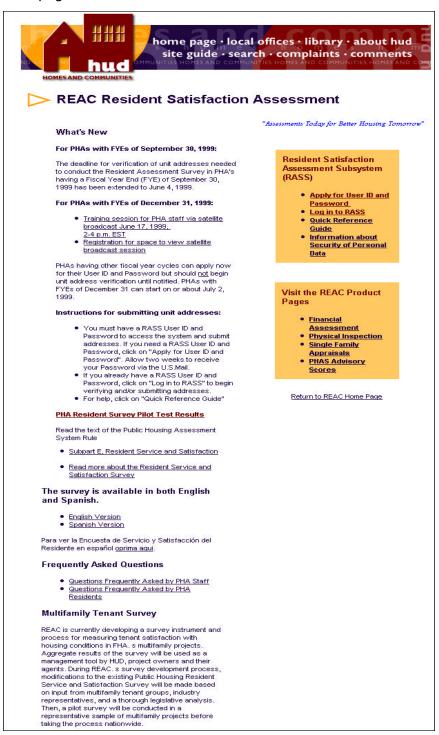
2. Double-click in the *Location* field under the toolbar to highlight the current URL.

NOTE: Highlighting the URL allows users to overwrite it with the desired URL. Or users can also use the Backspace or Delete key to delete the current URL.

⁺Copyright© Yahoo! Inc. All rights reserved. Protected by the copyright laws of the United States and international treaties.



Enter the following URL address: www.hud.gov/reac/rearessur.html in the location field.
 The REAC Resident Satisfaction Assessment home page displays. Use the scroll bar to view the entire page.



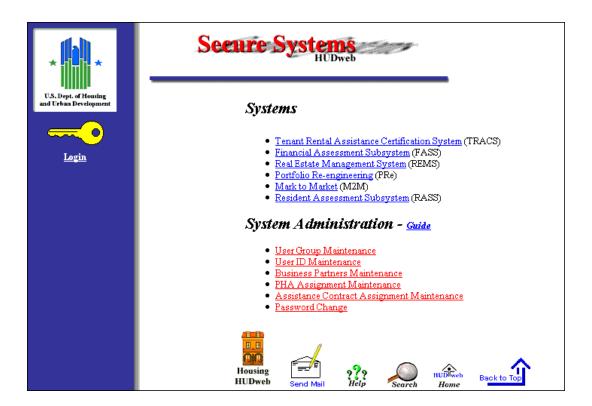
- On the REAC Resident Satisfaction Assessment page, scroll down to the Resident Satisfaction Assessment Subsystem (RASS) box.
- 5. Click on the <u>Log in to RASS</u> link. The **Username and Password Required** window displays.
- Resident Satisfaction
 Assessment
 Subsystem (RASS)

 Apply for User ID
 and Password
 Log in to RASS
 Quick Reference
 Guide
 (Updated 9/10/99)
 Information about
 Security of
 Personal Data

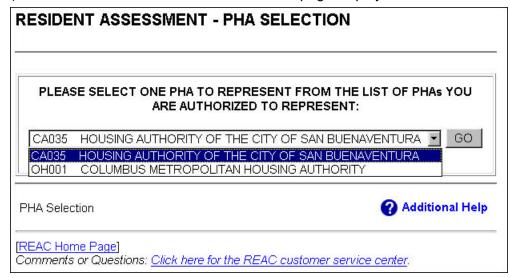
- Enter your system ID in the *User Name* field.
 The system ID is case-sensitive; remember to use capital letters when entering the system ID. *Do not enter your name in the User Name field.*
- 7. Using the Tab key on the keyboard, move to the *Password* field. Enter your password. The password is also case-sensitive; enter the password exactly as you requested it on the registration application.



8. Click on the button. The **Secure Systems** main page displays.



9. Under the *Systems* heading, click on the underlined <u>Resident Assessment Subsystem</u> (RASS) link to access RASS. The **PHA Selection** page displays.



- 10. Users can view, edit, submit data for only one PHA at a time. Click on the right drop-down arrow to view a list of PHAs assigned to the User. Click on a PHA to select it.
- 11. Click on the GO button. The **Resident Assessment PHA Main** page displays.

| TIA ANTIS | TON ALOO4 RASS MAIN SCREEN |
|---|---|
| General Information | |
| Background | |
| Media Packet | • 0 |
| Unit Address and Language | Information |
| Implementation Plan and Fo Survey Summary Results ar | |
| Survey Summary Results at | to recommendations |
| Media Packet | |
| Poster | |
| Unit Address Information | Сонфlete 08/12/1999 |
| Unit Address Information Plans, Summaries, and Recon | and date Assistant Control of Co |
| | and date Assistant Control of Co |
| Plans, Summaries, and Recon | nmendations |
| Plans, Summaries, and Recon | nmendations Complete 10/12/1999 |
| Plans, Summaries, and Recon Implementation Plan Follow-up Plan | nmendations Complete 10/12/1999 |
| Plans, Summaries, and Recon Implementation Plan Follow-up Plan Survey | nmendations Complete 10/12/1999 |

Exiting RASS

Users can exit and return to RASS at any time. There is no need to certify your work before exiting the system, *only use the Certify button when you are ready to submit your information to HUD*. Because RASS is a secure system containing sensitive public housing information, users should exit RASS when leaving the computer.

To exit RASS:

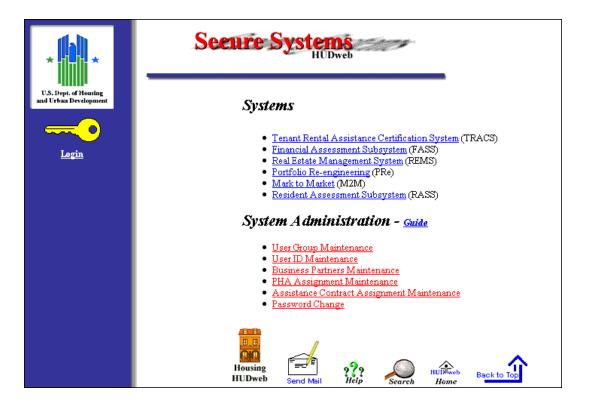
- 1. Save any changes on each page using the appropriate Save buttons.
- 2. Click on the control icon in the top right corner of the screen. The RASS application closes and the desktop displays.

This page is intentionally left blank.

Chapter 5: System Administration

As the Coordinator you perform system administration functions to provide a User with access to RASS and to assign the User rights to their PHA. First, you must establish yourself as a Coordinator in the system. Once established as a Coordinator in the system, you can then retrieve system IDs for registered Users of the PHA(s) you represent. You can assign rights to Users to submit data for your PHA.

Secure Systems



The **Secure Systems** main page contains two sections: Systems and System Administration. The *Systems* section provides underlined links to HUD's secure systems. The list of underlined system links varies based on your rights.

The *Systems Administration* section allows you to control system access and update User information (e.g., email address).

NOTE: In this guide, "user" is a generic term which includes both Users and Coordinators.

Establishing a Coordinator

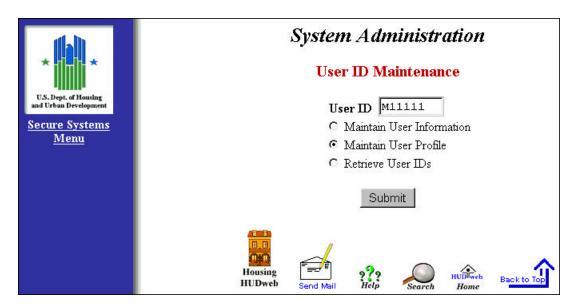
The first step in establishing yourself as a Coordinator begins when you receive your system ID from the PHA Executive Director. You can use your system ID and the password submitted in your registration application to log in and set up system rights.

User ID Maintenance

After you log in and reach the **Secure Systems** page, you should perform system administration functions in the following order for the system to recognize you as a Coordinator for RASS.

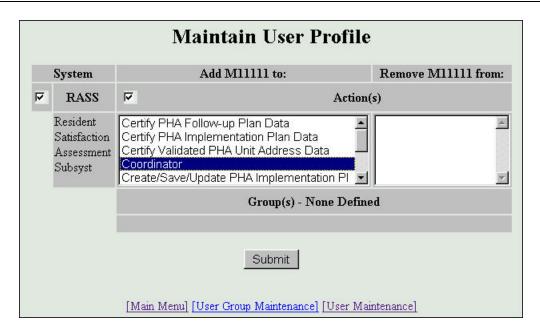
To establish yourself as a Coordinator in the system:

1. On the **Secure Systems** main page, click on the <u>User ID Maintenance</u> link. The **User ID Maintenance** page displays.



- 2. Enter your system ID. Remember to capitalize all letters in the system ID.
- 3. Click on the Maintain User Profile radio button.
- 4. Click on the Submit button. The Maintain User Profile page displays.

NOTE: This page is for Coordinators only. Once established as a Coordinator, you can use other system administration functions to retrieve system IDs for Users, assign system roles to Users, and assign Users to PHAs to allow them to submit data through RASS.

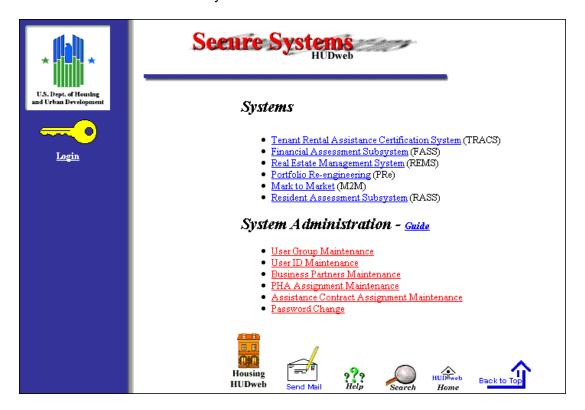


- 5. Click in the checkbox to the left of RASS to indicate the system(s) desired.
- 6. Click in the first checkbox to the left of *Action(s)* to add an action for that system.
- 7. Click on "Coordinator" from the list of actions to highlight it. Use the scroll bar, if necessary.
- 8. Click on the submit button. An **Update Results** page displays to confirm your update, which allows you to act as the Coordinator for that system for PHA(s) you represent.



NOTE: To remove a Coordinator action for a system, click on the Review User link. The Maintain User Profile page displays again. "Coordinator" is now also in the Remove column, indicating that the Coordinator is now established as a Coordinator for RASS. To remove the action, click on the checkbox in the last column, highlight "Coordinator," and click on Submit. The Update Results page displays again, confirming Coordinator rights are removed for that system. To return to the Secure Systems page, click on the Secure Systems Menu link.

9. Click on the <u>Secure Systems Menu</u> link to return to the <u>Secure Systems</u> page, or click on the <u>Secure Systems</u> control icon to exit the system.



Establishing a User

After a User has registered with HUD and notified you (the Coordinator) of their registration, you can retrieve the User's system ID. You also assign the User access rights to RASS and to the PHA's data. Finally, you provide the User with their system ID.

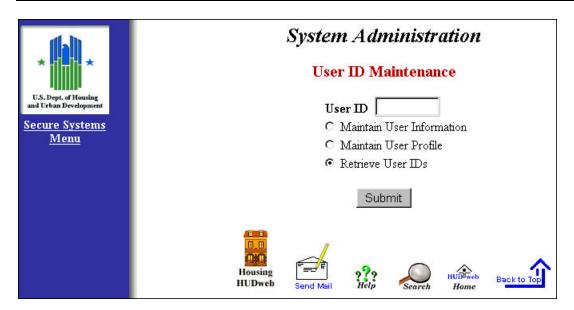
NOTE: Registration applications are processed nightly, so allow at least 24 hours between User registration and Coordinator retrieval of the system ID.

User ID Maintenance

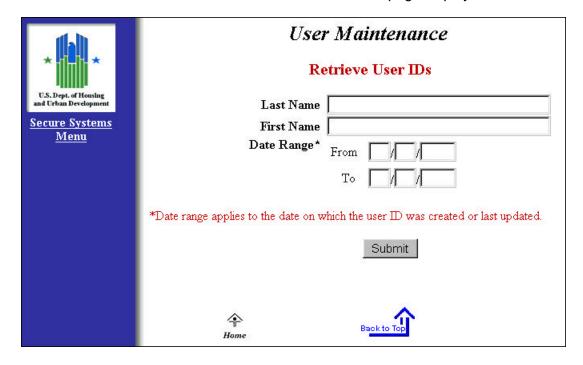
As the PHAs Coordinator, you are responsible for controlling access to the system and the PHA's projects. You should verify a User is authorized to do business for the PHA prior to allowing the User access to RASS and the PHA's properties. The first step in assigning the User system rights is to retrieve the User's system ID.

To retrieve a User's system ID:

1. On the **Secure Systems** main page, click on the <u>User ID Maintenance</u> link. The **User ID Maintenance** page displays.



- 2. Click on the Retrieve User IDs radio button.
- 3. Click on the Submit button. The Retrieve User IDs page displays.

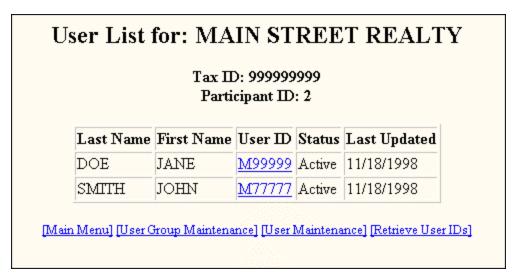


- 4. Enter the User's last name in the Last Name field.
- 5. Enter the User's first name in the First Name field.

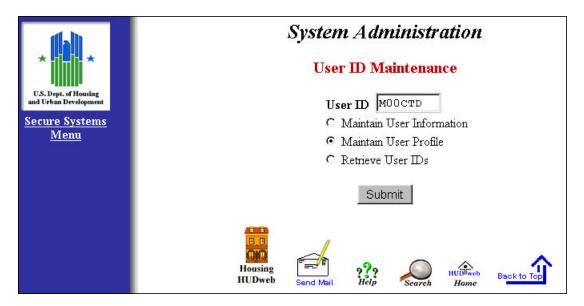
NOTE: If entering a date range, use the 2-digit month, 2-digit day, and 4-digit year format. Tab from one field to the next field. The date fields can be used, for example, if you

have several Users that registered in the same week and you want to retrieve all of their system IDs at once.

6. Click on Submit. The User List page for the PHA displays, including the PHA's tax ID, the participant ID, and a list of all Users for the PHA for the specified date range. Refer to the User ID column.



7. Click on the <u>User Maintenance</u> link. The **User ID Maintenance** page displays.

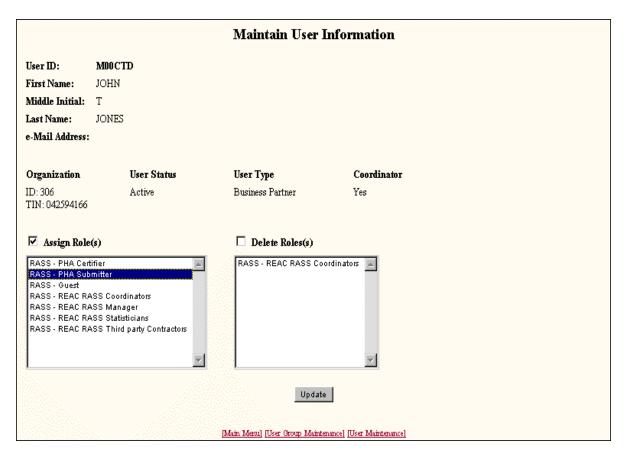


Next, you must assign a role to the User, allowing the User to perform the appropriate function in the system. There are two roles for PHA Users: PHA Submitter and/or PHA Certifier.

| Role | Description | | |
|---------------|--|--|--|
| PHA Submitter | PHA User who will be submitting draft data to REAC | | |
| PHA Certifier | Individual associated with the PHA that will certify data for REAC | | |

To assign an access role to a User:

- 1. On the **User ID Maintenance** page, enter the User's system ID in the *User ID* field.
- 2. Select the *Maintain User Information* radio button.
- 3. Click on Submit. The Maintain User Information page displays.



NOTE: The system ID is confirmed at the top of the page. The majority of the fields presented on the page, however, come from registration information, including name, e-mail address, and PHA organization name and number. The default is "Active," which is appropriate for a new or current user. "Terminated" inactivates the system ID, restricting access to Secure Systems. For example, if a User will be on extended leave, their ID should be terminated until their return.

- 4. To assign a role, click on the checkbox next to Assign Role(s).
- 5. Click on the role to select it from the list. To select multiple roles, hold down the Ctrl key and click on the roles.
- 6. Click on the Update Dutton. The Update Results page displays, confirming the role update was successful.

Update Results

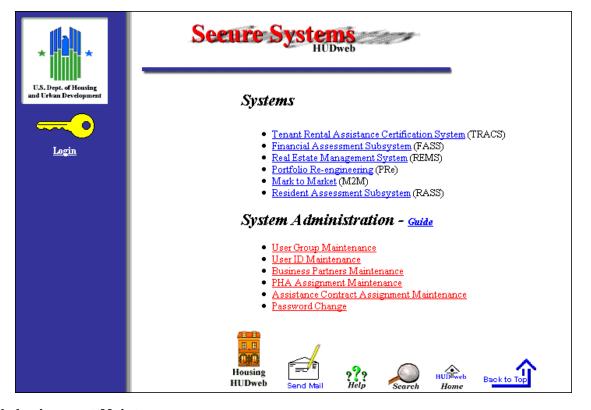
All updates have been successfully completed.

[Review User M00CTD]

[Secure Systems Menu] [User Maintenance]

NOTE: To review the current role, click on the <u>Review User</u> link. The **Maintain User Information** page displays again. The role now displays in the right column under Delete Role(s) to allow you to delete the currently assigned role if necessary. When deleting a role, remember to first check the checkbox next to Delete Role(s).

7. Click on the Main Menu link. The **Secure Systems** page displays.

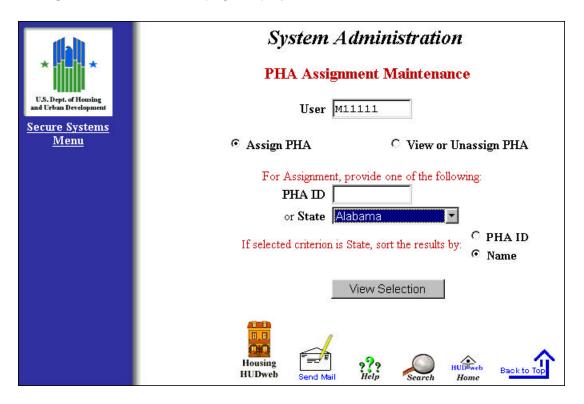


PHA Assignment Maintenance

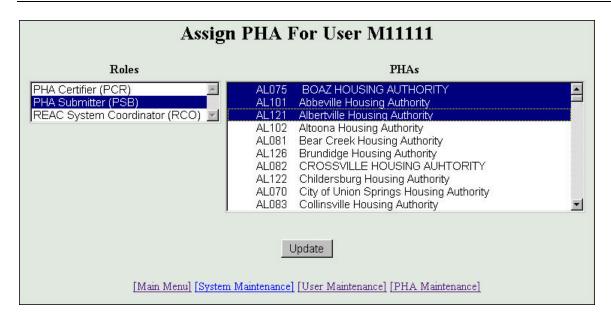
In addition to a system role, the User must also be assigned to the PHA. As the Coordinator, you can only assign Users to PHAs you represent. For PHAs, the User needs to contact the Coordinator for those PHAs.

To assign a PHA to a User:

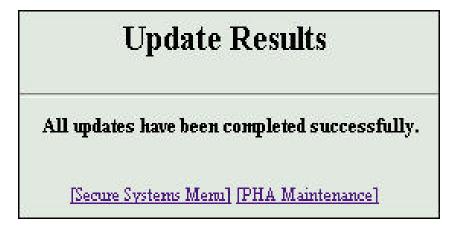
1. From the **Secure Systems** page, click on the <u>PHA Assignment Maintenance</u> link. The **PHA Assignment Maintenance** page displays.



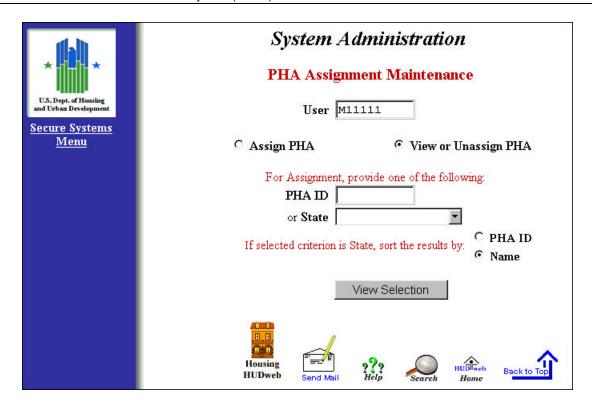
- 2. Enter the User's system ID in the User field.
- 3. Click on the Assign PHA radio button.
- 4. Enter the PHA ID in the *PHA ID* field or click on the right drop-down arrow to select a state in the *State* field. Click on a state from the list to select it.
- 5. To select the sort criteria, click on either the PHA ID or Name radio button.
- 6. Click on the View Selection button. The **Assign PHA For User** page displays.



- 7. Select the appropriate User *Role* from the list by clicking on the selection to highlight it.
- 8. Select the appropriate *PHA* from the list by clicking on the selection to highlight it. Hold the Ctrl key down and click to select multiple PHAs.
- 9. Click on the Update Results page displays.

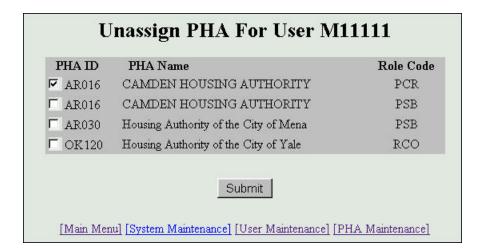


10. Click on the PHA Maintenance link to return to the **PHA Assignment Maintenance** page.



To view a User's current PHA assignments:

- 1. From the **PHA Assignment Maintenance** page, enter the User's ID in the *User* field.
- 2. Click on the View or Unassign PHA radio button.
- 3. Click on the View Selection button. The **Unassign PHA** page displays.

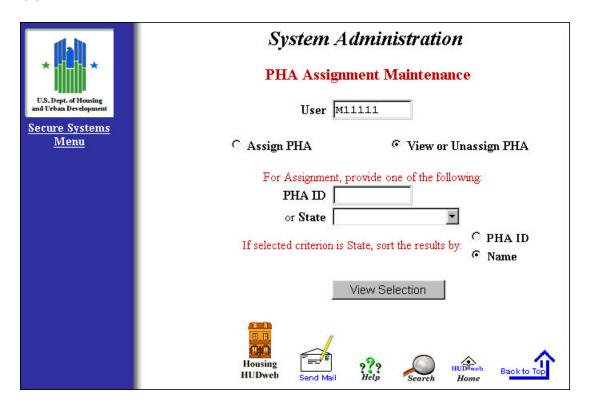


4. Click on the <u>PHA Maintenance</u> link to assign additional PHAs; or click the <u>User Maintenance</u> link to assign roles or update User information; or the <u>Main Menu</u> link to return to the **Secure Systems** page.

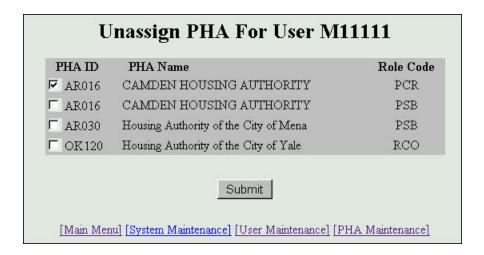


To delete a User's rights to a PHA:

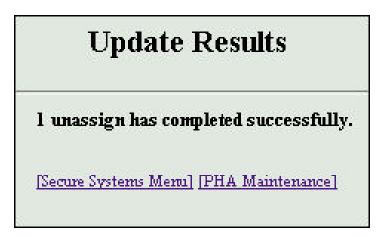
1. From the **PHA Assignment Maintenance** page, enter the User's system ID in the *User* field.



- 2. Click on the View or Unassign PHA radio button.
- 3. Click on the View Selection button. The **Unassign PHA** page displays, listing the PHAs correctly assigned to the User.



- 4. Click on the checkbox to select the PHA to unassign.
- 5. Click on the Submit button. The **Update Results** page displays.



6. Click on the <u>Secure Systems Menu</u> link to return to the **Secure Systems** main page, or click on the <u>Secure Systems</u> control icon to exit the system.



Final Step in User Set-up

After retrieving the User's system ID, assigning the User the appropriate role and PHA(s), you can now provide them their User ID to access the system.

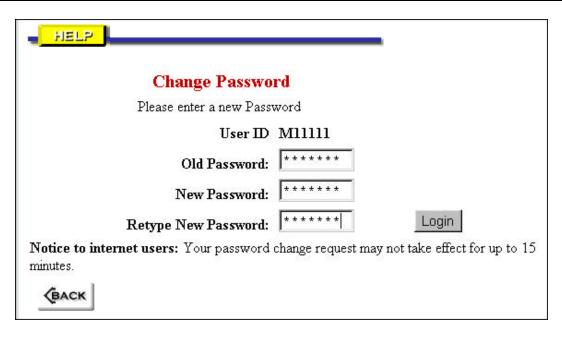
Password Change

On the **Secure Systems** page, under System Administration, the Password Change option allows Users and Coordinators to change their own passwords.

NOTE: Unlike system IDs, User passwords are not accessible to Coordinators.

To change the password:

1. From the **Secure Systems** page, click on the <u>Password Change</u> link. The **Change Password** page displays.



- 2. Enter the old password and tab to the next field.
- 3. Enter the new password and tab to the next field.
- 4. Retype the new password.
- 5. Click on the Login button. The old password is changed to the new password and the **Secure Systems** page displays.



NOTE: The password change is not instantaneous; it may take up to 15 minutes to implement on the server.

Business Partners Maintenance

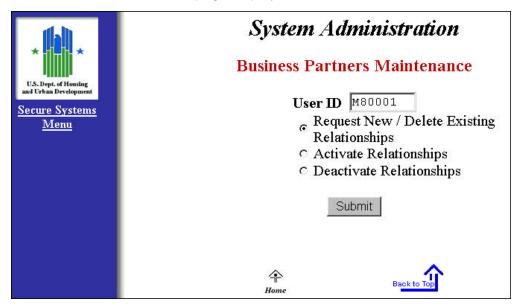
The Business Partner Maintenance feature allows **Coordinators** to represent additional business partners (i.e., PHAs). You only register once. If you need to represent additional PHAs as their Coordinator, you must request a new business partner relationship for each additional PHA. Once the new relationship is activated in the system, you can act as the Coordinator for the additional PHA.

Establishing Additional PHA Relationships

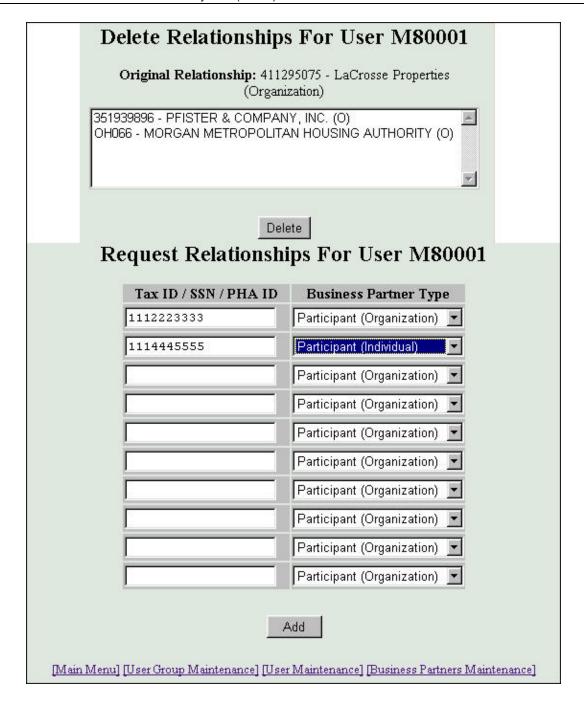
Remember, Coordinators are determined by the PHA. The first step in establishing a new business partner relationship (in addition to the PHA under which you are registered) is to make a request to be the Coordinator for the new PHA in the system.

To request a new business relationship:

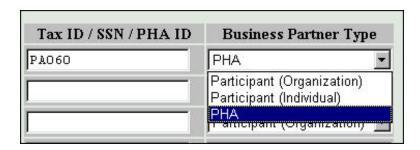
1. From the **Secure Systems** page, click on the <u>Business Partners Maintenance</u> link. The **Business Partners Maintenance** page displays.



- 2. Enter your system ID in the *User ID* field.
- 3. Select the Request New/Delete Existing Relationships radio button.
- 4. Click on the Submit button. The **Delete/Request Relationships** page displays. The "Original Relationship" identifies the PHA you registered under. The box immediately below displays additional PHAs you represent (if any).



- 5. Scroll down to the *Request Relationships* section. Click in the first column, and enter the *PHA ID* for the PHA.
- 6. In the *Business Partner Type* column, click on the right drop-down arrow to view a list of options. Click on "PHA" to select it.



7. Click on the Add button at the bottom of the page. A **Confirmation** page displays.

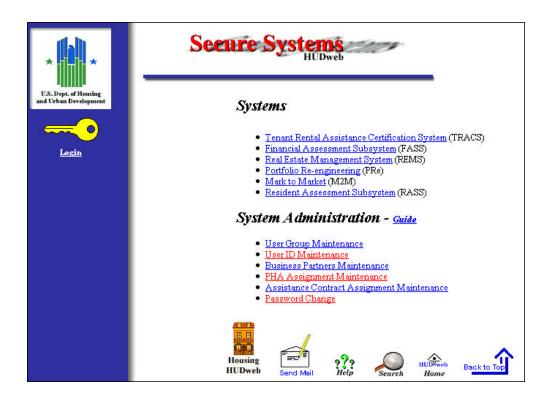
| Add Participant Info | Confirm |
|--|----------|
| PA060 NORTHUMBERLAND COUNTY HOUSI 50 MAHONING STREET MILTON PA 17847-1021 | NG AUTH. |
| | |

NOTE: The system automatically checks the PHA ID against the HUD database. A message displays if the information is not valid. If the information is not correct, click the cancel button to return to the previous page and re-enter the correct information.

8. Click on the *Confirm* checkbox to confirm you are requesting to be displayed as the PHA's Coordinator.



- 9. Click on the Submit button to submit the request.
- 10. Click on the Main Menu link to return to the **Secure Systems** page, or click the **I** control icon to exit the system.



Activating an Additional PHA Relationship

After requesting an additional PHA relationship, HUD sends the PHA's Executive Director a letter, to verify you as the PHA's Coordinator and provide the Executive Director with your activation key. A Coordinator is authorized when they receive their activation key from the Executive Director. The Coordinator then needs to activate the relationship with this "new" PHA in the system.

To activate a new PHA relationship:

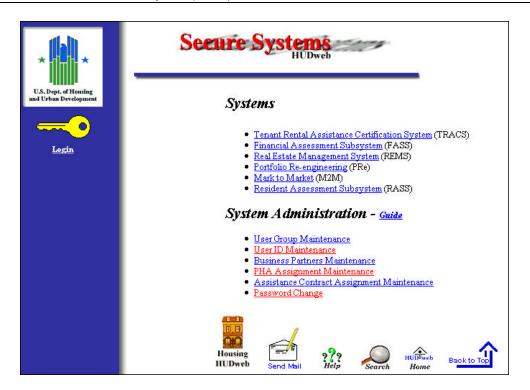
1. On the **Business Partners Maintenance** page, click on the *Activate Relationships* radio button. The **Activate Relationships** page displays.

| Activate Relationships For User M80001 | | | | |
|--|---------------|--|-------------|--------------|
| Select those you wish to activate | | Tax ID / PHA ID |) Ac | tivation Key |
| OH066 - MORGAN METROPOLITAN HOUSI | >>>> | | XX123 | |
| | Subm | it | | |
| [Main Menu] [User Group Maintena | ince] [User M | aintenance] [Business F | artners Mai | ntenance] |

- 2. In the left column, click on the PHA to select it. Use the scroll bar if necessary. Then click on the button. The PHA ID automatically displays in the middle column. Note: To deselect an organization, click on the select button.
- 3. In the right column, enter the *Activation Key* and click on the Submit button. The **Activation Results** page displays. If the relationship was not activated, return to the previous page and correct the errors.

| Activation Results For User M80001 | | | | |
|--|--|--|--|--|
| The following relationships | were activated successfully: | | | |
| N/A | | | | |
| The following relationships | were not activated due to errors: | | | |
| Participant ID: 15000000 | Activation Key: XX123 | | | |
| [Main Menu] [System Maintenance] [User | Maintenance] [Business Partners Maintenance] | | | |

4. Click on the Main Menu link to return to the **Secure Systems** main page.

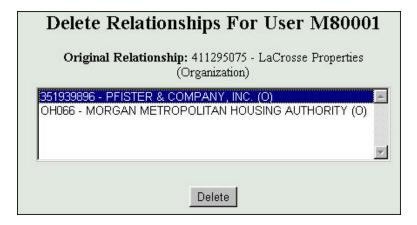


Deleting a PHA Relationship

If you, or the backup Coordinator, no longer serve as the Coordinator for a PHA, the relationship with that PHA must be deleted. Remember the system allows a PHA a maximum of two Coordinators.

To delete a Coordinator relationship with a PHA:

- 1. On the **Business Partners Maintenance** page, enter the Coordinator's system ID in the *User ID* field.
- 4. Select the Request New/Delete Existing Relationships radio button.
- 5. Click on the Submit button. The **Delete/Request Relationships** page displays.



- 6. In the *Delete Relationships* section, click on the PHA to select it. Use the scroll bar, if necessary. Use the Ctrl key to select more than one option.
- 7. Click on the Delete button to delete the Coordinator relationship with the PHA. The **Update Results** page displays confirming your deletions.



8. Click on the <u>Secure Systems Menu</u> link to return to the **Secure Systems** page, or click on the <u>I</u> control icon to exit the system.

